

Ritchie Law Office, Ltd.

Estate Planning Process

Step 1: Ritchie Legacy Planning Session:

- Initial Meeting with Chad A. Ritchie to discuss your estate planning needs
- Chad Reviews completed Estate Planning Questionnaire
- Chad talks to you about your family, probate assets analysis, and other estate matters
- Chad presents various estate planning options and estate plan strategy is chosen
- Engagement Letter is signed and Signing Ceremony Date or Trust Design Meeting is Scheduled

Step 2: Trust Design Meeting:

- This meeting is needed if a Trust Plan is chosen
- At this meeting we go through details of the Trust Design itself
- If Will Plan is Chosen usually the next meeting is the Signing Ceremony

Step 3: Drafting Period:

- Chad and his staff gather additional information needed to complete Estate Planning Documents
- Estate Planning Documents, including Wills, Trusts, Power of Attorneys, etc. are drafted
- Drafts of documents are sent to clients for review via e-mail and/or first class mail

Step 4: Signing Ceremony:

- Any final questions about Estate Planning Documents are answered
- Client approves Estate Planning documentation
- All Estate Planning Documents are signed by you
- Chad and his staff make sure all documents are properly witnessed and notarized

Step 5: Client Receives Documents:

- Client receives copies and originals of all Estate Planning Documents
- Client receives final written instructions regarding Estate Planning documents

Step 6: Trust Transfer Phase (If Trust Documents are part of Estate Plan)

- Checklist of assets to be transferred to Trust are approved by Client
- Document authorizing Chad A. Ritchie to contact Banks, Insurance Companies, Security Firms signed by client
- Ritchie Law Office, Ltd. and/or Client contact financial institutions to complete asset transfer to new Trust

Step 7: Trust Transfer Completion

- All assets transfers are confirmed
- Asset Transfer Completion Report Sent to Client